
The Journey To Mastery™ Managers Action Monday Manual

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Licensor

licensee

By: _____

By: _____

Name: _____

Name: _____

Its: _____

Its: _____

Date: _____

Date: _____

683859

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The Power Of Commitment Packet.p65

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Action Monday Managers Introductory Overview

The first purpose of Action Monday's is for new agents to go over the past week's schedule. Be acknowledged for what they did complete and be "held accountable" for what they did not complete. (See Accountability Script) Being held accountable is not a punishment but a privilege. Having someone to take the time to give feedback to the person stuck and not seeing what they scheduled, clearly for their best interest, how it could have been accomplished and getting that support is truly a gift.

At 9:00 you will meet with your Team Leaders. You will be running this group and being the model for how they will run their group for that morning. You will be reviewing their past weeks schedule holding accountable and reviewing next weeks schedule (this should have been made out in advance). You will determine which "Cluster Group" they will go to after team break. Have them write their name in appropriate group as each person is completed.

This should last 45 minutes with a 15 minute break so all is ready for the 10:00 meeting.

The room is set in horseshoe (see Ideal Room Setup).

Warm greeting to all and proceed with wins and struggles. This allows for them to share their experiences of the week and learn from each other. This will go 10:00 to 10:45.

You may see the need to spend 10 to 15 minutes in this time frame to review a training piece depending on what has come up in your morning group or something that has been shared that morning.

They will now break into their individual teams. It will be determined by the results of this past week what "Cluster Group" they will go to after the break. The Team Leader will direct each person after review of schedule to go to cluster sign up sheet to sign name under group they will go to after break. You will walk room and listen in on groups to see how they are doing. This will last 10:45 to 11:20. Then 15 minute break.

Back from break – break into Clusters.





Action Monday Timeline and Forms Overview

9:00 to 9:45 ACTION MONDAY MANAGER RUNS MEETING WITH TEAM LEADERS

As their team leader you fill out:

TEAM LEADER'S CLUSTER REPORT & EXCEPTIONS LIST

(You will have determined which Cluster Group they will join after the Team Meeting and have them write it on the group list on wall.)

Team members attach to their file completed:

WEEKLY SCHEDULE (filled out for next week)

AGENT REPORT (filled out with current information)

(Make sure room is re-set for start of meeting in horseshoe)

9:45 to 10:00 BREAK for Team Leaders

10:00 SHARP ACTION MONDAY BEGINS

10:00 to 10:45 WARM UP AND WINS & STRUGGLES

(Paperwork my NOT be done in the room! after it starts!!!)

10:45 to 11:20 TEAM LEADERS MEET WITH THEIR TEAMS

Team Leaders conduct their group just like you did with them at 9:00.

(With the exception of Buyer Certification) Team Leader will complete

TEAM LEADER'S CLUSTER REPORT & EXCEPTION LIST

They will, at the end of their meeting, have determined which Cluster Group each will be coming back to after break and have them write in on the appropriate group page. They also attach their **Weekly Schedule** and **Agent Report** in their folder.)

11:20 to 11:35 BREAK





Action Monday Timeline and Forms Overview

11:35 to 12:25 CLUSTER GROUP MEETING

People not meeting standard come back after lunch for TRIAGE. The standard being: 0, 1 and 2 groups always go to Triage. If someone has been in group 3 or 4 for more than 3 weeks in a row without movement then they go to Triage. No one in group 5 is required to go to Triage and may leave after Cluster Meeting.

LUNCH BREAK (Manager determines time: 1hr to 1 ½ hours)

1:30 (or as determined) TRIAGE

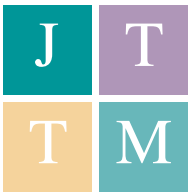
To last 1 ½ to 2 hours.

Action Monday Manager to fill out:

- **MANAGER'S CLUSTER REPORT ANALYSIS & EXCEPTION LIST REPORT.**
- Manager to complete computer spreadsheet for Doug & Ellaine Yeaman.

These 2 reports are to be E-Mailed to Doug. Cluster Report by Tuesday after Action Monday. The spreadsheet by Friday of that week to be E-mailed to both Doug and Ellaine's individual E-mails.





Action Monday Managers Overview

Action Monday Overview

I Set Up

Room set up is chevron style which may be modified to accommodate the size of the group. The room requires 2 flip charts and 3 training tables to be set as follows (please see the **diagram on page 17**).

1. Trainer Table Supplies

- a. Clock
- b. Clip board
- c. Markers
- d. Calculator
- e. Jelly Beans
- f. Dictionary
- g. Handouts
- h. Water pitcher and water glass
- i. Coffee for trainer

2. Supply Table Supplies

- a. Schedules
- b. Reports
- c. Sign up board for Home Tours
- d. Sign up board for any training during the week

3. Water Table

- a. This table should have water and tissues only – no coffee or food allowed in a training room. There may be occasions or times that other audio video equipment is utilized and a screen may be set up behind the training table. Audio equipment, such as a microphone may be necessary in groups in excess of 100. Please verify with trainer to his/her specific preferences in this matter.

II Good Morning

It is recommended that name tags and accountability folders are set up for each new recruit when coming on board with the program. These files will be utilized to track the attendance, contacts and production of the new agent. These files are used at all trainings or meeting with the recruit and are kept in a traveling file cabinet for the trainer(s) to monitor the progress new agents.

1. File Set up

- a. A manila file folder with prongs is recommended to keep papers neat and organized and to reduce the likelihood of paper loss





Action Monday Managers Overview

- i. The left side of the file folder is reserved for schedules – each week a new schedule is simply filed on top of the previous weeks time management, this allows both the trainer and the agent a history of time management at their fingertips
- ii. The right side of the file folder is reserved for the weekly report – again the new report is simply filed on top of the hold report putting a history of contacts and achievements at fingertips.
- iii. The permanent training nametag for each agent is attached to the outside of the folder and agents are asked to re-attach the tag at the end of each training. The files are then re-filed and ready for the next event.

2. Manage nametags not lists – by having

- a. 2 identical bins for file storage you may easily take attendance of your group. When the training event begins, simply remove the original bin that you brought the accountability files in and replace it with an empty bin. When the agents leave the training event, they will place their files into the new bin and the files returned will be the files of the attendees, any file not returned will simply be marked absent, you will need to double check this with the files still in the 1st bin for verification purposes.

3. The supply table in the registration area – this

- a. table will have whole punches to attach pages to files, schedules, reporting sheets, certified buyerforms and other forms necessary in the processing of the real estate transaction. The agents should be directed to have schedules and reports filled out prior to coming into the training room. Of course we do need to get them up to speed the first couple of weeks and someone will need to be standing by to offer assistance to any new agents.

III Welcome – The opening of each action Monday will begin by a few

minutes of sharing wins and areas where agents feel that they need support. This is something that needs to be done to allow a free and open communication style to develop among the agent to agent relationships and the agent to trainer relationship.

1. Wins –

agents take an opportunity to discuss wins be they at an open house or the bell going off in their head allowing them to see the next relevant step in their journey as real estate agents. This is something that





Action Monday Managers Overview

corners can not be rounded on and the environment must be very uplifting and supportive encouraging everyone with an issue to add to participate.

2. **Struggles – Or Challenges (NOT LOSSES)**

this is also important, it allows the agent to see and learn from his/her fellow agent's struggles. This portion of the morning is kept very limited and the topics should have outcomes that many people can learn from and not be too individual specific.

IV Morning Training –

the morning training is a very broad training that can help an agent, no matter their stage of development. It could be something like working on Tip analysis or working through the theory of jelly bean jar management. This should be a segment that lasts approximately 30 minutes or less.

V Break into Teams & Clusters –

1. Break into Teams –

are a peer to peer feedback session with session monitors observing and adding input, the purpose of these groups is to graduate into the next section. When an individual moves through all sections, he/she should be complete with the program and be in holding for any transaction to close.

Morning Break 15 minutes

2. Break into Clusters –

- a. The breakout groups are divided into 5 sections and then sub-groups may be created from the sections depending on the size of the master group
 - i. Group 0 – **New Agents** - This is specifically directed to new agents who have no appointments and have yet to complete basic skill modules to move into the next group. Focus is on scripts and orientation items.
 - ii. Group 1 – **No appointments.** This group is directed towards helping agents schedule more appointments. This group is focused on driving business to them with vehicles such as Quantum Home Tour™ their sphere of influence, getting their name out and showing that they are actively working in real estate. **Focus is on scheduling Quantum Home Tours™ and setting up Jelly Bean Jar for lead follow-up; mastering scripts! Quantum Home Tours™ are scheduled here and everyone has one!**





Action Monday Managers Overview

- iii. Group 2 – **One to three appointments** – this group continues to look for more appointments; thus driving their business. Discussions center around networking and Quantum Home Tours™ and making sure these are scheduled and getting leads and appointments. **Focus is on scheduling and running Quantum Home Tours™; better script mastery! Run them better and make more appointments.**
- iv. Group 3 – **Less than six appointments** – this group works to raise the appointments and the focus is generally Jelly Bean Jar and following up on past leads from Quantum Home Tours™; may include scheduling another Quantum Home Tour™ or buttoning down leads to appointments. **Focus is on more appointments.**
- v. Group 4 – **Six or more Appointments** – this group works to create buyers from their appointments. **The focus is on probing and making sure the appointments are with real people.**
- vi. Group 5 – **Three or more certified buyers** – this group works to certify their buyers; looking for input on bringing their buyers to the end of the certification process and having a contract in place. Discussions are around re-certifying buyers and re-probing appointments for potential buyers that have not written contracts. **Focus in getting contracts written; they are exempt from running Quantum Home Tours™.**

VII Break

Lunch Break

VIII Triage

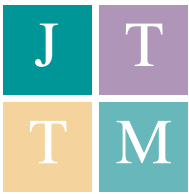
Triage is an opportunity for agents who need special coaching to receive the assistance they need. It is a hands on small group training that tackles subjects that are important in growing your business such as Appointment Making Workshop. These sessions last approximately 1 ½ to 2 hours.

Two Groups evolve after time management:

- 1) Appointment work.
- 2) Probing work.



QUANTUM
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MANAGER'S HOUSE KEEPING

ACCOUNTABILITY SCRIPT

Start with welcome and acknowledgment, high-toned and friendly:

“Good morning! Good to see you!

Before you go in to the training room, I have a few questions to ask you. This process is an important part of the training. It is designed to help you get full value from the program.

1. First: Did you make commitment to be here on time? (If question is not answered directly, be understanding and friendly, and ask question again.

If question needs to be asked three times, refer to appropriate item on foundation.

2. Next question: Did you keep that commitment? (Again, if questions is not answered directly, be understanding and friendly, and ask question again.)

3. Next: Could you have kept the commitment, make sure you receive a clear yes, this is how they take responsibility for the result of their commitment. If you do not receive a clear yes ask them again “could you have kept your commitment to be here on time?” stay with them until you receive a clear yes!

4. Now: What would have to happen for you to be here on time from now on?

(Support participant in identifying the relevant steps he/she could take to be on time).

5. Good! Will you re-commit to being here on time? (If the answer is not clear “Yes”, go back to question #3.) (When the answer is a clear “Yes”, go on to next part of script.)

Terrific! Thank you for your commitment.

You see, the training is designed to help you get more of what you want in your life, by making and keeping commitments. These questions weren't meant to make you feel bad or guilty, but rather to help you to get the most out of the training.

Do you feel all right about the process we went through? (If not a clear “Yes”, probe briefly and help them let go.

When the answer is a clear “Yes”, go on to next part of script.) Your not bad or wrong. Your just what? Late! Right!





Action Monday Managers Overview

The purpose of Cluster Groups is to receive support on moving forward with the immediate goal being to advance to the next group.

In the beginning each group is led by a company experienced agent that is participating in the program by supplying open houses and that are trained on how to support participants in the JTM process. On start up these groups may started with company managers. Once you start to have graduated JTM agents they are the ideal leader to volunteer to support these groups. The advantage to the graduated JTM agent is that it keeps you fresh in the training environment and in the commitment environment. Also when you give to others good things come back to you.

Group 0

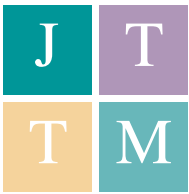
As new agents enter the program they stay approximately 2 weeks in this group to get through the checklist for the basics in office orientation, operation and getting set up to work. They “graduate” from this group when they have completed the list. This group is usually run by someone in the administration staff.

Groups 1 through 4 are detailed in manual.

Group 5 is run by Action Manager. This is where new Buyers are Certified or buyers in process are re-Certified.

*Participants may be in two groups. Say they only have 1 appointment but they have 1 certified buyer. They would go to group 2 (1-3 appointments) and then to group 5 to have the one buyer certified.





Action Monday Cluster Group Overview

The purpose of Cluster Groups is to receive support on moving forward with the immediate goal being to advance to the next group.

Objective for each participant in Cluster Group is: *“How am I going to get to the next group up?”*

Time allotted for Cluster Groups is approximately 1 hour.

A. GROUP 0 – NEW AGENT

As new agents enter the program they stay approximately 2 weeks in this group to get through the checklist for the basics in office orientation, and getting set up to work. They “graduate” from this group when they have completed the list. This group is usually run by someone in the administration staff.

ACTION: *Focus is on scripts and orientation items. This group always comes back after lunch break for TRIAGE.*

B. GROUP 1 – NO APPOINTMENTS

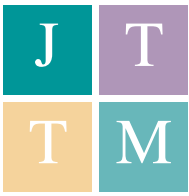
This group is directed towards helping agents schedule more appointments. This group is focused on driving business to them with vehicles such as Quantum Home Tour, their sphere of influence, getting their name out and showing that they are actively working in real estate.

ACTION: *Focus is on scheduling Quantum Home Tours and setting up Jelly Bean Jar for lead follow-up and mastering scripts! Quantum Home Tours™ are scheduled here and everyone has one. This group always comes back after lunch break for TRIAGE.*

C. GROUP 2 – ONE TO THREE APPOINTMENTS

This group continues to look for more appointments; thus driving their business. Discussions center around networking and Quantum Home





Action Monday Cluster Group Overview

tours and making sure these are scheduled and getting leads and appointments.

ACTION: *Focus is on scheduling and running Quantum Home Tours, better script mastery! Run them better and make more appointments. This group will come back after lunch break for TRIAGE.*

D. GROUP 3 – LESS THAN SIX APPOINTMENTS

This group works to raise the appointments and the focus is generally Jelly Bean Jar and following up on past leads from Quantum Home Tours; may include scheduling another Quantum Home Tour or but-toning down leads to appointments.

ACTION: *The focus is on more appointments. This group will comeback after lunch for TRIAGE.*

E. GROUP 4 – SIX OR MORE APPOINTMENTS

This group works to create buyers from their appointments.

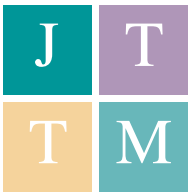
ACTION: *The focus is on probing and making sure the appointments are with real people (buyers or sellers). Does not have to come back from lunch with 6 or more appointments. If they have been in this group 2 weeks with out converting 1 or more to certified buyers the are to attend TRIAGE for more training.*

F. GROUP 5 – THREE OR MORE CERTIFIED BUYERS

This group works to certify their buyers; looking for input on bringing their buyers to the end of the certification process and having a contract in place. Discussions are around re-certifying buyers and re-probing appointments for potential buyers that have not written contracts.

ACTION: *Focus in getting contracts written; they are exempt from running Quantum Home Tours. This group does not have to return after lunch. They are doing business.*





Action Monday Triage Overview

Standard for being in afternoon *Triage*:

0,1,2 & 3 groups will always be in afternoon Triage group for further practice and reinforcement. If someone has been in group 3 or 4 without movement forward then they are to participate with the Triage group to work on skill sets they need to move forward. Group 5 is always done after Cluster meeting and does not come.

The people coming back after lunch break are the ones not meeting standard. This is not punishment but extra assistance in practice sessions to break through where they are stuck right now.

They breakdown into two basic groups:

#1. APPOINTMENTS:

If they are not making enough appoints to have buyers they are working on appointment making skills. Problem solving on where they are failing to connect with potential clients. Are they not connecting on open houses – practice on Open House scripts and asking to simply drop by to deliver “stuff”. Practice on *ASKING* for the appointment. They break down in small groups of 2 or 3 and practice with each other or having one observer to make comments and suggestions.

If their appointments are not showing up work on confirm scripts.

#2. BUYERS:

They have buyers but they are not buying in a timely manner. They work on PROBING-PROBING-PROBING. They need to be more confident and connect better with client in the initial probing session. Again they break down in small groups of 2 or 3 and practice with each other or having one observer to make comments and suggestions.

You will be going to each group dropping in where appropriate for comments and suggestion as well. Being responsible for the whole groups progress. If it requires taking time to bring the whole groups attention to re-emphasise training piece do it. You are responsible for them getting to their next phase.

These sessions should last approximately 1 ½ to 2 hours.





TEAM LEADER'S CLUSTER REPORT & EXCEPTION LIST

Name _____

Date _____

Section I Attendance

Number of people in cluster _____
 Number present _____
 Number Late/Still coming _____
 Number no show _____
 Total (Must balance) _____

Names of no shows

1. _____
2. _____
3. _____
4. _____
5. _____

Section II Results

Number of escrows opened _____
 Number of escrows closed _____
 Number of listings taken _____

People not making standard

1. _____
2. _____
3. _____
4. _____
5. _____

5 min

Section III Time Management

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	Check to see agent is using system
<input type="checkbox"/>	<input type="checkbox"/>	Check monthly calendar (scheduled events)
<input type="checkbox"/>	<input type="checkbox"/>	Daily work planner for every day worked
<input type="checkbox"/>	<input type="checkbox"/>	Logging P I N's
<input type="checkbox"/>	<input type="checkbox"/>	Check "I" time (15-20 hrs)
<input type="checkbox"/>	<input type="checkbox"/>	Check "P" time (10-15 hrs)

People off of TM System

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

10 min

Section IV Review Week

- Write all "real" leads on "Certified Buyer Checklist" collected during week & put into file

Lead name Phone number Address Agent's name Quantum Home Tour™ name

- Prepare all new clients on for Buyer Certification group
- Re-Certify all Certified Buyers and prepare for Certification group

10 min



**QUANTUM
MANAGEMENT
SYSTEMS**



TEAM LEADER'S CLUSTER REPORT & EXCEPTION LIST (cont'd)

Section V Analysis

Identify to Which Group Individuals will be going

Quantum Home Tours™ _____

Fliers passed out _____

Names & numbers collected _____

Appointments made _____

Certified Buyers _____

Assign to Cluster Group ① ② ③ ④ ⑤

People not holding QHT's or O.H.'s

1. _____

2. _____

3. _____

4. _____

5. _____

(Schedule to Triage Group)

Names of people with no appointments

1. _____

2. _____

3. _____

4. _____

5. _____

Group 1

Work 1:1 on phone script

People with appts but no Certified Buyers

1. _____

2. _____

3. _____

4. _____

5. _____

Group 2

Work 1:1 on Probing

These Sections are filled out in Cluster Groups

Section VI Plan of Action - to set minimum 4 appointments for week

1. Each person uses their Weekly Schedule for Monday.
2. Look at each lead & plan next step.
3. Look at each client to see what has to happen to put transaction together.
4. Verify that each individual is using appointment technology.
5. Review how to handle Quantum Home Tour™ leads.
6. Make sure appointments are showing up or need confirming calls.
7. Role making appointments.

30 min

Section VII Taking Action

1. Direct to leave and commit to complete action.
2. Work with to complete calls & take action
3. Purpose of Action Monday™ is to line up week
 - *Set 4-6 appointments to drop by/probe
 - * Have 3 Certified Buyers
 - * Set 2 appointments to show property
 - * Write 1 offer

People needing special attention

1. _____

2. _____

3. _____

4. _____

5. _____

5 min



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AGENT NAME: _____
MENTOR : _____ **DATE:** _____

SECTION I ATTENDANCE (circle one)
Present / Hiatus / Unexcused

SECTION II TIME MANAGEMENT

- Weekly Schedule
- Tip Analysis
- 20 Hours Prospecting
- 6 Appointments
- Quantum Home Tours™ Scheduled

SECTION III ACTIVITY

Quantum Home Tours™ held: _____
Names & phone numbers collected: _____
Number of appointments from Quantum Home Tour™: _____
Number of Drop By appointments from Quantum Home Tour™: _____
Total Number of appointments: _____
Number of new clients/prospects this week (list): _____

- | | | | |
|----------------|--------------|----------------|---------------|
| 1. Name: _____ | Phone: _____ | Address: _____ | Source: _____ |
| 2. Name: _____ | Phone: _____ | Address: _____ | Source: _____ |
| 3. Name: _____ | Phone: _____ | Address: _____ | Source: _____ |
| 4. Name: _____ | Phone: _____ | Address: _____ | Source: _____ |
| 5. Name: _____ | Phone: _____ | Address: _____ | Source: _____ |
| 6. Name: _____ | Phone: _____ | Address: _____ | Source: _____ |

Number of Listing Presentations Made: _____
Number of Certified Buyers™ total (list): _____

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

SECTION III RESULTS

Number of new escrows open this week: _____
Number of escrows open total: _____



WEEKLY SCHEDULE

AGENT NAME: _____	WEEK BEGINS: _____
OFFICE: _____	_____

SUMMARY OF LAST WEEK:

of Quantum Home Tours™ _____ #Leads _____ #Drop by _____ #Probes _____ #Write offer _____ #Open Escrows _____ # Closed Escrows _____

TIP ANALYSIS: #T _____ %P _____ %I _____ %N _____ Avg. Hrs. Day _____ Avg. N hrs Day _____

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Date							
7:00							
8:00							
9:00							
10:00							
11:00							
12:00							
1:00							
2:00							
3:00							
4:00							
5:00							
6:00							
7:00							
8:00							
9:00							

	Client/Phone	Type	Day	Time	Next Step	Day	Time	Next Step
1								
2								
3								
4								
5								
6								
7								
8								

	Scheduled Open House Addresses	Date	Time
1			
2			
3			



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COMMITTED BUYER CHECKLIST

For _____	Company _____
Client _____	Date acquired _____
Date called _____	Appointment Date: _____
Open house _____	Address _____
Work phone () _____	Home phone () _____

CLIENT SOURCE:	
Open House.....a	
Floorcall.....b	
Jelly Bean Jar.....c	
Cold Call.....d	
Farm.....e	
Mailout.....f	
Community.....g	

Let me review with you how I work. I don't work with every potential buyer, but the clients I do engage with, MUST be committed to producing results.

PHASE ONE - BUYER INTERVIEW

- YES NO **WE HAVE AGREED:**
- 1. To have all decision makers present in person.
 - 2. To spend at least 45 minutes in interview.
 - 3. To come to an agreement on what you're looking for.
 (1) _____
 (2) _____
 (3) _____
 - 4. That I am your exclusive agent and I represent you.
 - 5. (Buyers agreement attached)
 - 6. That you will be **Pre-Approved** by _____ for \$ _____.
 - 7. That you are prepared to buy now.
 - 8. Date/time of next appointment.
-
- 9. That we will be in communication.
 - 10. Buyer is prepared to make a decision on property and to make an offer.

PHASE TWO - SHOWING PROPERTY

Again, I don't work the way most agents do. I only want to show you properties that are meaningful and fit your needs.

- 1. Pre-write offer and have on clipboard before showing property.
- 2. Show 3 properties.
- 3. Bring back to office for debriefing.
- 4. Write offer.(Go to 3A)
- 5. Re-interview to redefine needs and identify where communication broke down.(Go to 3B)

PHASE 3A- SHOWING PROPERTY

- 1. Pre-write offer and have on clipboard.
- 2. Present offer.
- 3. Countered.
- 4. Accepted.
- 5. Set financing appointment and give completed file to escrow specialist.

PHASE 3B-SHOWING PROPERTY

- 1. Re-establish needs _____
- 2. Identify what got in the way _____
- 3. Show 3 properties.
 (1) _____
 (2) _____
 (3) _____
- 4. Bring back to office for debriefing.
- 5. Write offer.
 (Go to 4A)
- 6. Make appointment with manager (date/time) _____
 (Go to 4B)

PHASE FOUR4A - MANAGEMENT SUPPORT

- 1. Pre-write offer and have on clipboard.
- 2. Present offer.
- 3. Countered.
- 4. Accepted.
- 5. Set financing appointment and give completed file to escrow specialist.

PHASE 4B-MANAGEMENT SUPPORT

- 1. Re-establish relationship with manager present.
- 2. Identify what got in the way with managers assistance.
- 3. Show 3 properties.
 (1) _____
 (2) _____
 (3) _____
- 4. Bring back to office for debriefing.
- 5. Write offer.(Go to 5A)
- 6. Discontinue working with client.(Go to 5B)

PHASE 5A

- 1. Present offer.
- 2. Countered.
- 3. Accepted.
- 4. Set financing appointment and give completed file to escrow specialist.

PHASE 5B

- 1. Help client understand that he/she is not a buyer now. Establish when they are.
- 2. Put on follow-ups and mailing list.



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In exchange for you as an agent/broker company, working to find a property for me, I agree to work **exclusively** with you, to the exclusion of any other broker/company and agent, for a period of _____ days. Also, I understand ~~that~~ you may present offers on my behalf for property offered as "For Sale By Owner".

I understand that I may continue to look at other properties, open houses, and responding to advertisements provided that I inform other parties that I am currently employing you as my agent/broker company and will identify you as my exclusive agent.

As the agent under this agreement, I understand that you will provide me with available information on all properties requested by me that are obtained by: 1) seeing any other properties listed and not listed, 2) any open houses and advertisements, and, 3) property listed as "For Sale By Owner". You, as my agent/broker company, agree to represent me and my interests.

Business Cards Provided

Clients

Date

Agent

Broker



MANAGER'S ACTION MONDAY™ REPORT, ANALYSIS & EXCEPTION LIST

Action Monday Report

- 1. Total Agents in JTM _____
- 2. Total New Pended Transactions _____
- 3. Total New Listings _____

Section I Cluster Reports And Team Analysis

- 1. Review Agent Reports.
 - 2. Identify "no-shows" and set appointment to meet in group.
 - 3. Identify agents who are dropping behind and schedule for Triage
 - 4. Insure Quantum Home Tours™ and are scheduled and in place
 - 5. Schedule agents into phone evening and insure "right" people are there.
- Completed _____

Section II Report on Action Monday™

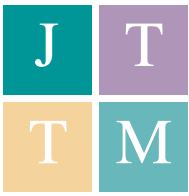
- 1. Assign Quantum Home Tour™ signs and fliers.
- 2. Report average appointments/agent (Group 1+) probing/drop bys _____
- 3. Report total number of agents with 6 appointments+ _____
- 4. Report total number agents with Certified Buyers _____
- 5. Report total number of Certified Buyers in JTM™ _____
- 6. Report total number of agents below standard and getting notice _____

Section III Report on Production

- 1. Report all agents with 3 Certified Buyers

- 2. Report all Listings Taken Agents _____ Property _____
- | | | |
|--|--|--|
| | | |
| | | |





MANAGER'S ACTION MONDAY™ REPORT, ANALYSIS & EXCEPTION LIST

Section III Report on Production (Cont'd)

TRANSACTIONS OPENED THIS WEEK:

Property Address	Client	Price	B, S, S/B	Lender	Escrow	Title	Date Opened	Date Target

(B) Buying Agent,
(S) Selling Agent,
(S/B) Both

TRANSACTIONS EXTENDED OR MODIFIED:

Property Address	Client	New Target Date	Other Changes

TRANSACTIONS FELL OUT:

Property Address	Client	Reason for Failure

TRANSACTIONS CLOSED:

Property Address	Client	Date Closed





Team Report

SAMPLE TEAM LEADERS REPORT FROM TEAM MEETINGS



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* This is your agenda; check off *

TEAM LEADER'S CLUSTER REPORT & EXCEPTION LIST

Name Ima Starr

Date 9/29/03

Section I Attendance		
Number of people in cluster		<u>12</u>
Number present	<u>8</u>	
Number excused	<u>2</u>	
Number no show	<u>2</u>	
Total (Must balance)		<u>12</u>
Names of no shows		
1. <u>Emma Lost</u>		
2. <u>Gonna Fishkin</u>		
3. _____		
4. _____		
5. _____		

Section II Results		
Number of escrows opened	<u>3</u>	
Number of escrows closed	<u>1</u>	
Number of listings taken	<u>2</u>	
People not making standard		
1. <u>Irma Looser</u>		
2. <u>Bobby Bust</u>		
3. _____		
4. _____		
5. _____		
		5 min

Section III Time Management		
Yes	No	* Check off as addressed *
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Check to see agent is using system
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Check monthly calendar (scheduled events)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Daily work planner for every day worked
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Logging P I N's
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Check "I" time (15-20 hrs)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Check "P" time (10-15 hrs)
People off of TM System		
1. <u>Conrad Fuzed</u>		
2. <u>Otto Control</u>		
3. <u>Clew Less</u>		
4. _____		
5. _____		
6. _____		
		10 min

Section IV Review Week		* Check off as addressed *					
<input checked="" type="checkbox"/> Write all "real" leads on "Certified Buyer Checklist" collected during week & put into file							
<table border="1"> <tr><td>Lead name</td></tr> <tr><td>Phone number</td></tr> <tr><td>Address</td></tr> <tr><td>Agent's name</td></tr> <tr><td>Quantum Home Tour™ name</td></tr> </table>			Lead name	Phone number	Address	Agent's name	Quantum Home Tour™ name
Lead name							
Phone number							
Address							
Agent's name							
Quantum Home Tour™ name							
<input checked="" type="checkbox"/> Prepare all new clients on for Buyer Certification group							
<input checked="" type="checkbox"/> Re-Certify all <u>Certified Buyers</u> and prepare for Certification group							
		10 min					



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TEAM LEADER'S CLUSTER REPORT & EXCEPTION LIST (cont'd)

* Check off as completed *

Section V Analysis

Identify to Which Group Individuals will be going

- Open Houses
- Fliers passed out
- Names & numbers collected
- Appointments made
- Certified Buyers
- Assign to Group ① ② ③ ④

People not holding QHT's or O.H.'s

1. Larry Lethargic
2. Danny Dreamer
3. _____
4. _____
5. _____

(Schedule to Triage Group)

Names of people with no appointments

1. Danny Dont
2. Sally Should
3. Gotta Go
4. _____
5. _____

Group 1

Work 1:1 on phone script

People with appts but no Certified Buyers

1. Harry Hopen
2. Wendy Wish
3. Lola Like-me
4. _____
5. _____

Group 2

Work 1:1 on Probing

These Sections are filled out in Cluster Groups

Section VI Plan of Action - to set 4 appointments for week

1. Each person takes out Daily work planner for Monday.
2. Look at each lead & plan next step.
3. Look at each client to see what has to happen to put transaction together.
4. Verify that each individual is using appointment technology.
5. Review how to handle Quantum Home Tour™ leads.
6. Make sure appointments are showing up or need confirming calls.
7. Role play floor time appointments.

30 min

This is group activity for cluster

Section VII Taking Action

1. Direct to leave and commit to complete action.
2. Work with partner to complete calls & take action
3. Purpose of Action Monday™ is to line up week
 - * Set 4-6 appointments to drop by/probe
 - * Have 3 Certified Buyers
 - * Set 2 appointments to show property
 - * Write 1 offer

People needing special attention

1. _____
 2. _____
 3. _____
 4. _____
 5. _____
- Names of people needing triage*

5 min



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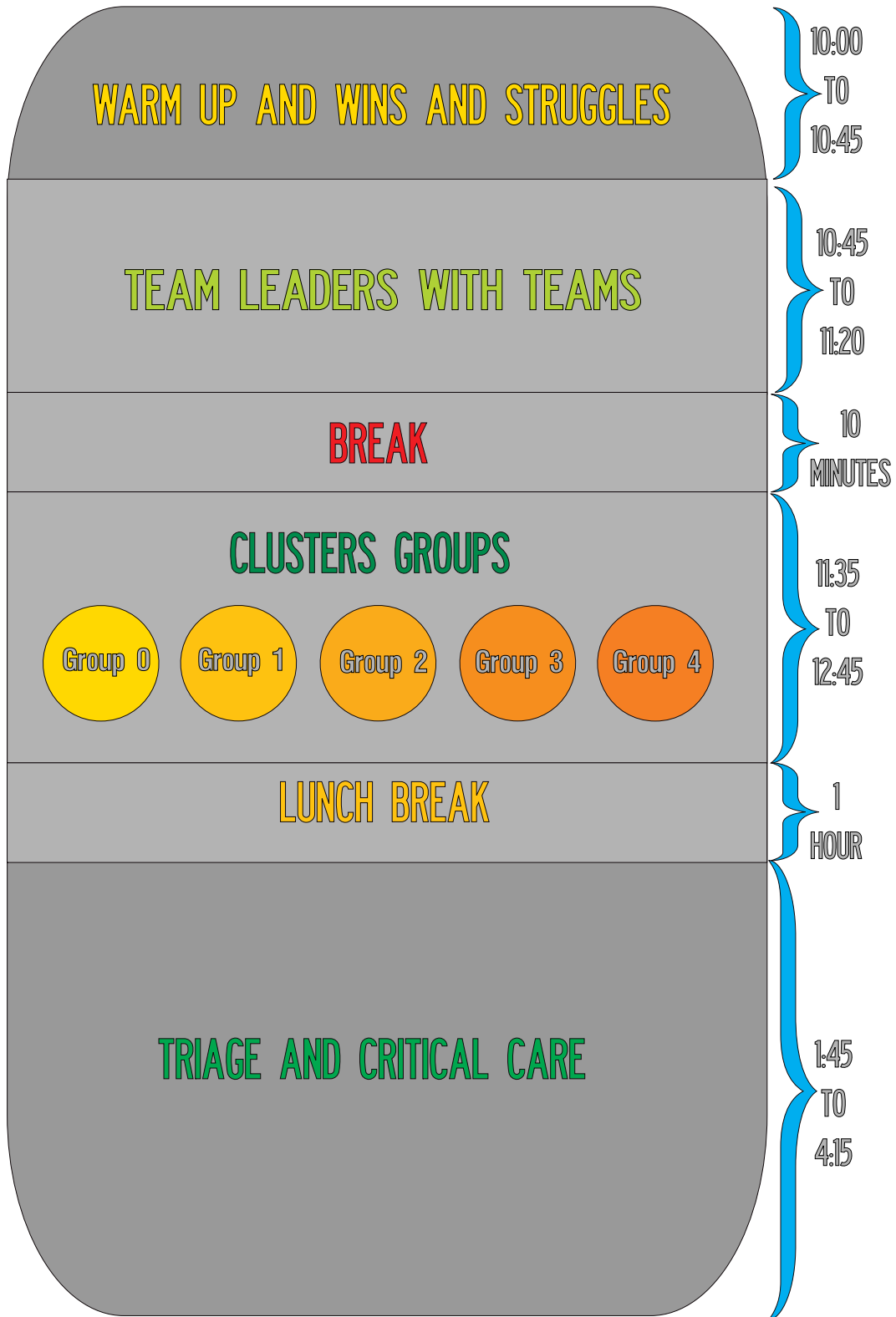
SCHEDULE

SAMPLE MANAGERS SCHEDULE OF THE DAY



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MANAGERS ACTION MONDAY TIMELINE



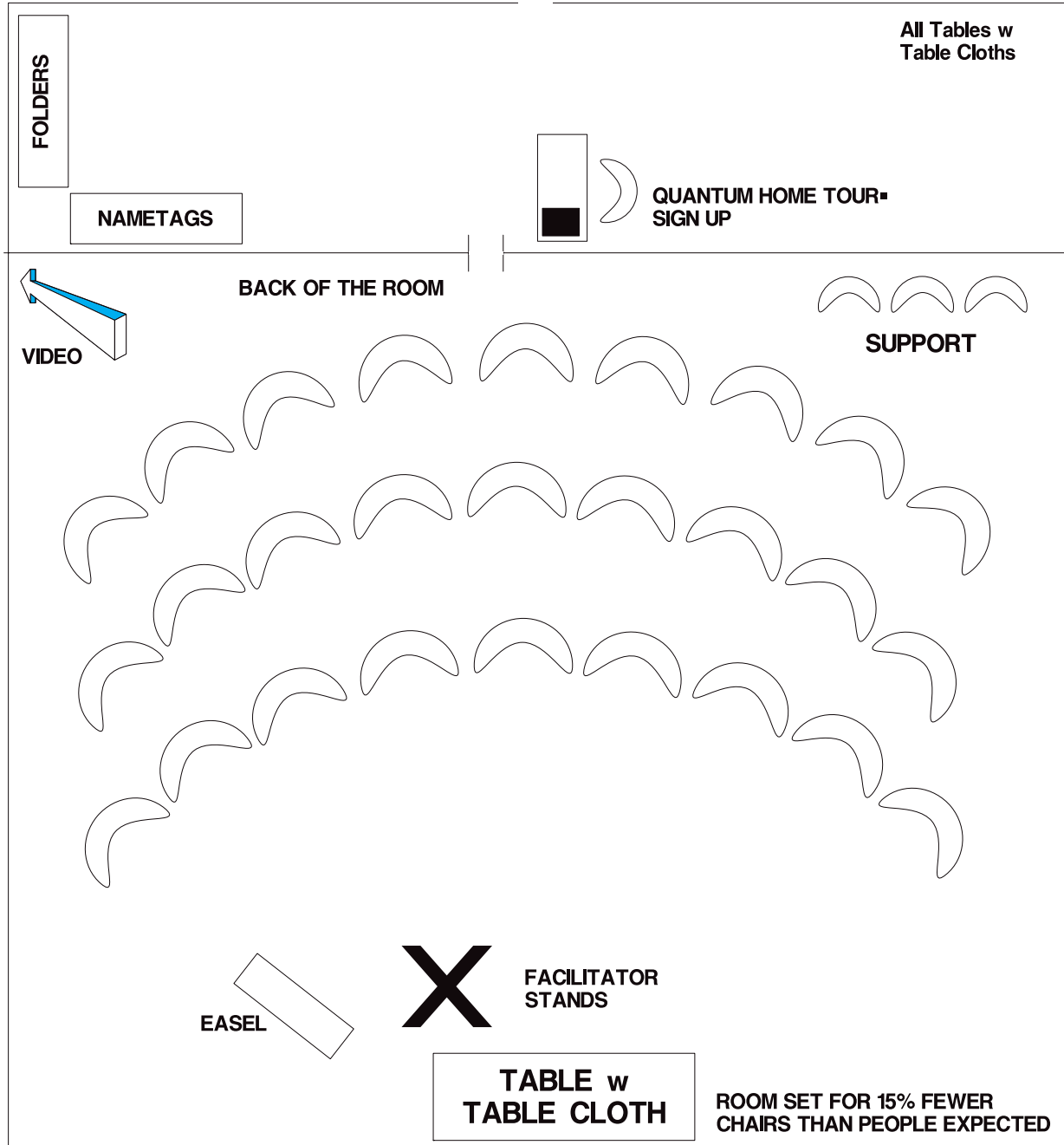


SET-UP & SUPPLIES



Ideal Room Setup

RESTROOMS





SUPPLIES NEEDED

1. Conference room
2. Flip Chart with Paper
3. Chairs
4. Quantum Home Tour™ inventory
5. Room and Directional Signs
6. Fliers/invitations (Stock supply, write in address)
7. JTM Cluster and Agent Reports
8. Pencils
9. Clock
10. OT&M forms
11. Garbage can
12. Phone scripts
13. Air conditioning (69 degrees)
14. Kleenex
15. Weekly schedule - Certified Buyer Checklists et al
16. Clipboard
17. Training Check list, Outline and Timeline
18. Cluster paper w names from last week on wall
19. List of Quantum Home Tours™ and Open Houses available for scheduling
20. One Appointment a Day Poster, "Posted"





See Action Monday Workshop Manual



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